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## **CF Training for Moral and Ethical Decision Making in an Operational Context**

by:

Michael H. Thomson, Kenneth L. K. Lee, and Barbara D. Adams

Humansystems® Incorporated  
111 Farquhar St., 2<sup>nd</sup> floor  
Guelph, ON N1H 3N4

Project Manager:  
Michael H. Thomson  
(519) 836 5911

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On Behalf of  
DEPARTMENT OF NATIONAL DEFENCE

as represented by  
Defence Research and Development Canada - Toronto  
1133 Sheppard Avenue West  
North York, Ontario, Canada  
M3M 3B9

DRDC Toronto Scientific Authority:  
Dr. Megan Thompson  
Dr. Joseph Baranski  
416-635-2000 ext. 3146

August 16, 2006



Author

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Michael H. Thomson  
Humansystems<sup>®</sup> Incorporated

Approved by

---

Carol McCann  
Section Head, Command Effectiveness & Behaviour

Approved for release by

---

K.M. Sutton  
Chair, Document Review and Library Committee

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## Abstract

A half-day focus group discussion exploring current Canadian Forces (CF) training for moral and ethical decision making (MEDM) in an operational context was convened at CFB Kingston, Kingston, ON with six active Commissioned and Non-Commissioned Canadian Forces Officers who each had operational experiences involving moral and ethical challenges. Participants emphasized the importance of robust MEDM training for CF operational effectiveness. They identified five indirect means of training MEDM, which include promoting and instilling CF ethos and identity; learning from CF members' operational experience and providing strong mentorship; evaluating and promoting individuals who consistently demonstrate high ethical conduct; systematizing MEDM knowledge transfer, and providing good post-MEDM support, including after action reviews, stress debriefings, and post-mission decompression opportunities. Participants also discussed specific requirements for training MEDM. For example, participants emphasized training MEDM is required at all rank levels and that it needs to occur regularly, as optimal MEDM cannot be promoted in a “*two-day*” course once every year. Lastly, participants also endorsed several direct means of training MEDM in an operational context. These included classroom case study training; live scenario-based training; and computer simulations.

## Résumé

Un groupe témoin, composé de six officiers commissionnés et sous-officiers actifs ayant été confrontés à des problèmes d'ordre moral et éthique lors d'opérations, a été convoqué à la BFC Kingston, Kingston (Ont.), à une demi-journée de réflexion pour examiner l'instruction que dispensent les Forces canadiennes (FC) sur la prise de décision morale et éthique (PDME) dans un contexte opérationnel. Les participants ont souligné l'importance d'une solide instruction à ce titre pour l'efficacité opérationnelle des FC. Ils ont indiqué cinq moyens indirects d'instruction, notamment, développer l'ethos et l'identité du militaire; puiser aux expériences opérationnelles des militaires et fournir à ces derniers un solide encadrement; récompenser par des promotions les individus qui font constamment preuve d'un comportement éthique irréprochable; organiser le transfert des connaissances en matière de PDME et assurer un bon soutien post-décisionnel comprenant, par exemple, des comptes rendus immédiats, des séances d'information sur le stress et des activités de décompression post-mission. Les participants ont également parlé des exigences particulières de l'instruction PDME, par exemple, qu'elle doit être dispensée à tous les niveaux de grades et de façon périodique, car la PDME optimale ne peut s'enseigner au moyen d'une unique session annuelle de *deux jours*. Enfin, les participants ont proposé plusieurs moyens directs d'instruction sur la PDME dans un contexte opérationnel, dont l'étude de cas en classe, des mises en situation réelle et des simulations informatiques.

## Executive Summary

This report emerges from DRDC (Defence Research and Development Canada) Toronto's long term research initiative to understand moral and ethical decision making (MEDM) in an operational context. The aim of this research is to help prepare Canadian Forces (CF) personnel to face and make these difficult decisions in current CF operations. To identify the current CF training mechanisms for MEDM in an operational context, a half-day focus group discussion was convened at CFB Kingston, Kingston, ON with six active-duty Commissioned and Non-Commissioned Canadian Forces Officers. Each of these participants was selected due to their operational experiences that had involved missions that entailed moral and ethical challenges.

SMEs identified five indirect influences on training MEDM.

1. SMEs emphasized the need for CF members to internalize the CF ethos such that acting counter to this ethos would be contrary to the core of their self-identity. Training, therefore, needs to reflect the core moral principles and values of the CF and to be wholly internalized.
2. SMEs also thought that MEDM training should be taught by operationally experienced individuals, and that a mentorship program would help promote moral and ethical decision making.
3. The evaluation and promotion process was identified as a means to ensure that the individuals promoted to positions of authority and responsibility act with integrity throughout their career.
4. Participants proposed that knowledge transfer about MEDM within an operational context needed to be formal and systematic, rather than the current practice in which such information is disseminated in an ad hoc or opportunistic fashion, primarily through private conversations. The rich knowledge gained through undertaking MEDM in operational contexts needs to be formally captured and then used in future training efforts, including professional development.
5. Participants also argued that an important part of promoting optimal MEDM decision making in the long term involves helping people cope with the tough ethical decisions that they were often required to make. For example, CF members returning from missions in the 1990s did not feel that they got the support they needed from the chain of command following the moral and ethical decisions they made in operations (for a full discussion, see Thomson, Adams and Sartori, 2006). SMEs stressed the importance of post-MEDM support mechanisms, such as after action reviews (AARs), discussions that validated their experience and actions, stress debriefings, and decompression after missions. These activities were argued to be a natural compliment to pre-deployment training for MEDM in an operational context.

The focus group identified several key features of the ideal MEDM training program. Specifically, the focus group emphasized that CF training for MEDM in an operational context must be open to all ranks and be a regular part of their overall training, such that MEDM becomes "*instinctive*". CF training for MEDM also requires emphasis on cultural awareness, and it needs to adopt a realistic, applied approach by reflecting not how people *should* make these decisions, but how they *actually* make them.

SMEs also identified several viable direct training mechanisms for promoting optimal MEDM.

1. A case study approach that would provide trainees an opportunity to mull over moral dilemmas in a classroom setting and discuss issues with other CF personnel as well as experienced instructors. It is important that these scenarios need to reflect current CF operations rather than being outdated examples from other countries' militaries.
2. Another direct training mechanism identified by CF personnel is live scenario-based training exercises, such as those at the Peace Support Training Centre (PSTC) in Kingston, ON. These allow CF members to develop self-control and discipline while undergoing a live training experience. Integrating a discussion of the moral and ethical aspects of these scenarios into AARs of exercises would also allow for a larger discussion of the implications of these situations and also introduce the notion of the potential for post-event reactions, with suggestions for a range of informal (e.g., buddy aid) to more formal interventions (e.g., AARs that focus on the impact of confronting these difficult operational challenges).
3. As well, SMEs argued that computer-based simulation MEDM training would enhance CF training in an operational context.

As a whole, then, this focus group provided critical guidance for the CF in terms of promoting the best environment for optimal MEDM and specific ideas about how training programs can be designed to build on the progress that the CF has already made. Hopefully, improved MEDM training systems focusing on current operational contexts will help to promote continued operational effectiveness within CF operations.

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## Sommaire

Le présent rapport est le fruit du long travail de recherche entrepris par RDDC (Recherche et développement pour la défense Canada) Toronto pour comprendre le processus de prise de décision morale et éthique (PDME) dans un contexte opérationnel. Le but de cette recherche est d'aider à préparer les membres des Forces canadiennes (FC) à prendre des décisions difficiles dans les opérations militaires actuelles. Afin de connaître les moyens actuellement utilisés par les FC pour dispenser l'instruction PDME dans un contexte opérationnel, on a convoqué à la BFC Kingston, Kingston (Ont.), un groupe témoin composé de six officiers commissionnés et sous-officiers actifs. Ces participants avaient été choisis parce que chacun d'eux avait déjà participé à des missions comportant des défis sur les plans moral et éthique.

Ces spécialistes ont isolé cinq facteurs agissant indirectement sur l'instruction PDME.

1. Ils ont souligné la nécessité pour les militaires d'intérioriser l'ethos des FC de telle sorte que tout geste allant à l'encontre de cet ethos soit en contradiction avec leur propre identité. En conséquence, l'instruction doit refléter les valeurs et les principes moraux fondamentaux des FC et doit être entièrement intériorisée.
2. Ils ont également émis l'opinion que l'instruction PDME devrait être dispensée par des personnes ayant l'expérience des opérations et qu'un programme de mentorat contribuerait à promouvoir la prise de décision morale et éthique.
3. Le processus d'évaluation et de promotion a été perçu comme un moyen de garantir que les personnes promues à des postes d'autorité et de responsabilité agissent avec intégrité tout au long de leur carrière.
4. Les participants ont suggéré d'officialiser et d'organiser le transfert des connaissances sur la PDME dans un contexte opérationnel pour remplacer le mode de fonctionnement actuel dans lequel l'information est transmise de façon ponctuelle ou opportune, surtout au cours de conversations privées. L'abondant savoir issu de la PDME au cours d'opérations doit être conservé en vue des prochains efforts d'instruction, y compris pour le perfectionnement professionnel.
5. Les participants ont fait valoir que la promotion à long terme d'un processus décisionnel optimal sur les plans éthique et moral suppose, dans une large mesure, d'aider les gens à assumer les difficiles décisions éthiques qu'ils ont eu à prendre. Par exemple, les militaires rentrant de missions dans les années 1990 n'avaient pas l'impression d'obtenir de la chaîne de commandement le soutien nécessaire à la suite des décisions morales et éthiques qu'ils avaient prises durant les opérations (pour une analyse complète, consulter Thomson, Adams et Sartori, 2006). Les spécialistes ont souligné l'importance des mécanismes de soutien post-PDME, comme les comptes rendus immédiats, des discussions destinées à valider leur expérience et leurs actions, des séances d'information sur le stress et des activités de décompression post-mission. Ces activités ont été jugées des compléments naturels à l'instruction pré-déploiement sur la PDME dans un contexte opérationnel.

Le groupe témoin a isolé plusieurs facteurs clés du programme idéal d'instruction PDME. Mais il a surtout insisté sur le fait que l'instruction PDME dans un contexte opérationnel devait être accessible à tous les grades et être un élément régulier de l'instruction globale afin que la PDME devienne « *instinctive* ». L'instruction que dispensent les FC sur la PDME doit, en outre, mettre

l'accent sur la connaissance des cultures et adopter une démarche appliquée réaliste qui ne s'appuie pas sur la façon dont les gens *devraient* prendre ces décisions, mais plutôt sur la façon dont ils les prennent *vraiment*.

Les spécialistes ont également indiqué plusieurs moyens directs d'instruction pour favoriser la PDME optimale.

1. Une démarche par études de cas qui donnerait aux stagiaires l'occasion de se pencher sur des dilemmes moraux et de parler de problèmes avec d'autres militaires ainsi qu'avec des instructeurs expérimentés. Les scénarios devront impérativement décrire les opérations courantes des FC plutôt que des exemples d'anciennes opérations menées par des armées étrangères.
2. Les exercices réels avec scénario comme ceux employés au Centre de formation des Forces canadiennes pour le soutien de la paix (CFFCSP), à Kingston (Ont.), constituent un autre moyen d'instruction. Ces exercices permettent aux militaires de perfectionner leur maîtrise de soi et leur discipline en situation réelle. En intégrant aux comptes rendus immédiats une analyse des aspects moraux et éthiques des scénarios appliqués, on étendrait la discussion aux implications des situations et on introduirait la notion de la possibilité de réactions subséquentes, en plus de proposer un éventail d'interventions ponctuelles (p. ex., aide du partenaire) et officielles (p. ex., comptes rendus immédiats sur l'impact de la confrontation de ces grands défis).
3. Les spécialistes ont ajouté que des simulations informatiques permettraient d'améliorer l'instruction PDME dans un contexte opérationnel.

Dans l'ensemble, le groupe témoin a donné aux FC des indications cruciales sur ce qui constituait le meilleur environnement pour la PDME optimale ainsi que des idées précises sur la façon de concevoir des programmes d'instruction qui puisent aux progrès déjà réalisés. Il est à espérer que les systèmes améliorés d'instruction PDME qui exploitent les contextes opérationnels actuels aideront à favoriser le maintien de l'efficacité opérationnelle dans les opérations des FC.

Michael H. Thomson, Kenneth L. K. Lee, Barbara D. Adams. 2006. CF Training for Moral and Ethical Decision Making in an Operational Context. DRDC Toronto CR 206-216. Defence R&D Canada – Toronto.



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# 1. Introduction and Aim

As part of an earlier initiative seeking to understand moral and ethical decision making (MEDM) in a military context, we interviewed a number of senior officers and asked them to describe some of the moral and ethical dilemmas that they faced in operations during the 1990s and to recount how they resolved them (Thomson, Adams, & Sartori, 2006). To complete the interview, these officers were asked about the training that they had received to help them make those kinds of decisions. These conversations showed that most participants had received little or no formal training in this area, and participants varied in terms of how well they felt that their military training had prepared them for making moral and ethical decisions during operations. It was clear that at least some respondents felt that Canadian Forces (CF) training had not fully prepared them for the moral and ethical decisions they had to make. Although progress has been made in the last decade in promoting ethical decision making in the CF, existing programs have not been strongly focused on operational contexts. As such, many important questions remain. If the CF could promote optimal MEDM in operational contexts, what indirect mechanisms might be most influential? What kind of training would be most helpful in optimizing ethical decision making?

In order to elucidate the kind or kinds of training that might best facilitate CF training for moral and ethical decision making in operations, we convened a focus group with six active duty Commissioned and Non-commissioned Canadian Forces Officers. Discussion during this focus group aimed at eliciting the views and ideas of SMEs about the kind of training required, and the training mechanisms that might help prepare CF personnel to make difficult moral and ethical decisions in both current and future operations. This report highlights key themes from the focus group discussion.



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## 2. Method

A half-day focus group with CF subject matter experts (SMEs) was convened at CFB Kingston in the spring of 2006 to discuss current CF training for MEDM in an operational context. SMEs were recruited on a personal basis by Humansystems Inc. Six SMEs were identified on the basis of their operational experience and their current involvement with instructing and training military personnel in a number of CF teaching institutions. Both Commissioned and Non-commissioned ranks were represented.

The focus group took the form of a semi-structured discussion. Moderators guided discussion around a number of general topics, but encouraged SMEs to speak freely and openly about any topic and that they believed was most relevant to the current CF training mechanisms for MEDM.

With the consent of all SMEs, the focus group discussion was audio recorded and later transcribed by members of the research team.

All research methods, including the use of informed consent and audio taping as well as the discussion questions for this research, underwent and received ethical approval by the Human Research Ethics Committee of Defence Research and Development Canada.



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## 3. Results

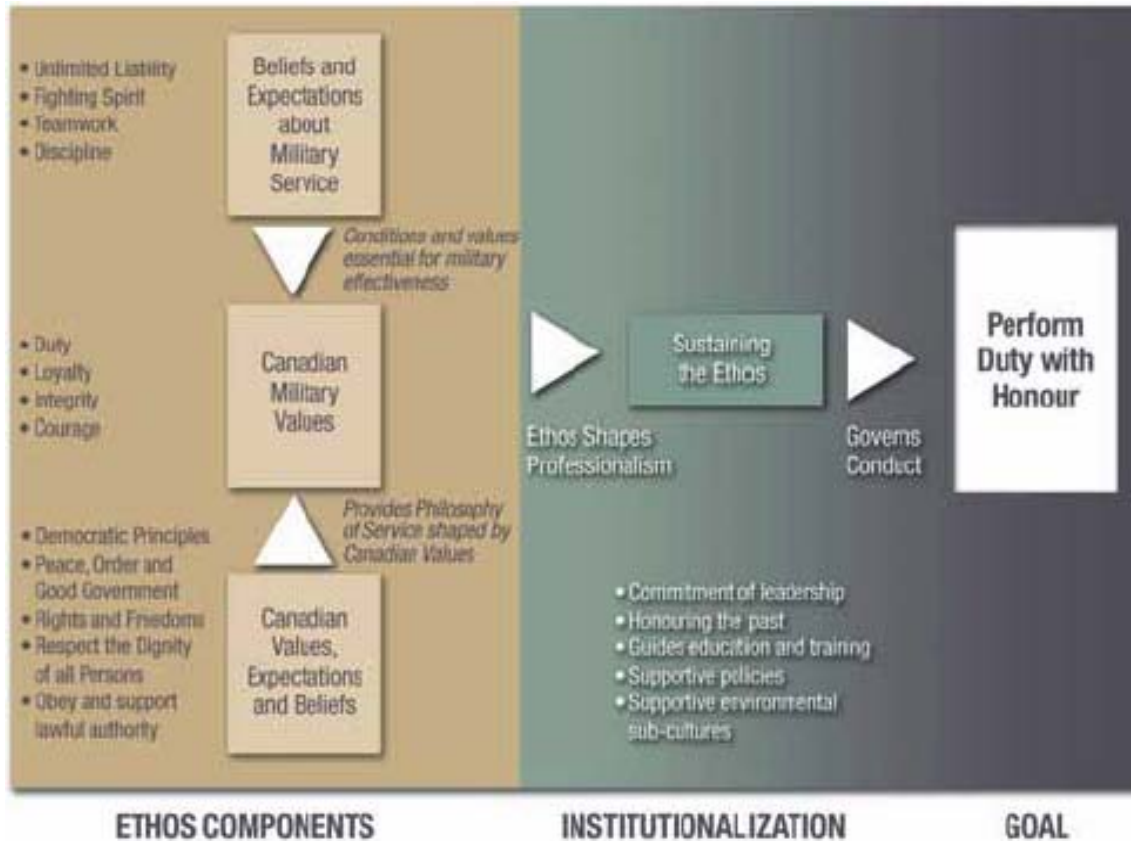
The focus group discussion provided a rich account of the factors that impact on MEDM and MEDM training. Participants argued that although formal training mechanisms represent the most obvious way of promoting optimal MEDM, other indirect factors are also critical influences on how CF members think about and enact MEDM.

### 3.1 Indirect Influences on MEDM

Focus group participants described five indirect influences that are likely to impact on MEDM. These include promoting the Canadian Forces' ethos and identity, building on experience and relying on a mentorship system, focusing on evaluation and promotion processes that emphasize ethical conduct, fostering systematic MEDM knowledge transfer throughout the CF, and providing good post-MEDM support.

#### 3.1.1 Promoting the Canadian Forces Ethos and Identity

SMEs believed that the central unifying theme underlying MEDM within the CF is adherence to the CF ethos. The CF ethos is comprised of beliefs and expectations associated with military service, Canadian values, and Canadian military values. As Figure 1 illustrates, the ethos should guide members' conduct and help them understand their responsibilities. SMEs agreed: *"You need an ethos. That helps you make a decision."*



**Figure 1: The military ethos (Canadian Forces Leadership Institute, 2003)**

SMEs believed instilling the CF ethos within members “*from day one*” was the logical beginning for training MEDM. Current CF ethos, they argued, needs to be taught to CF members from an early stage, so that the values underlying the ethos can be internalized within their identities. SMEs agreed that the CF ethos must be “*embedded*”, i.e., internalized, within CF members’ identity such that it allows members to reflexively make decisions between right and wrong. Ideally, the CF ethos must be so ingrained in its members that it becomes a fundamental component of their self-identity.

A soldier’s identity is primarily derived from the military ethos (i.e., the distinguishing character, beliefs, and moral nature of the group). A soldier who identifies with the CF derives self-worth from participating in the group and embodying its values, beliefs, and expectations. For such a soldier, the failure to uphold these internally desired standards can be the ultimate self-betrayal. In addition to the internal drive of maintaining one’s own sense of self, external forces are also likely to be influential. The CF ethos ensures that the expectations and behaviours associated with the CF role are clearly understood, in part, to provide guidance in morally ambiguous situations. As a member of an organization with norms and standards to be upheld, failing to act in accordance with the CF ethos could also give rise to potential sanctions from the CF. These internal and external forces interweave to ensure that CF members follow CF moral and ethical principles.



One good example of CF identity internalization comes from a SME who had concerns about the CF after participating in a mission in the 1990s. This compelled him to take part in CF transformation. At the focus group, importantly, this same person expressed his belief that the CF has come a long way and he was proud to be part of it. This anecdote demonstrates individuals who are personally involved in the growth of an organization's guiding values and principles may be better able to internalize these as part of their own value system. This SME's commitment and contribution to renewing the CF identity allowed him to recalibrate his own moral and ethical standards with that of the CF. Once again, it highlights the importance for soldiers to endorse the CF's stated principles and values on a personal level.

However, the greatest challenge any institution faces in implementing an ethics program is instilling the group's core moral principles and values in the minds of its members such that those individuals actually conduct themselves accordingly. This cannot be achieved by merely articulating core ethical principles and delineating the specific virtues that they want members to reflect. Thus, the CF must look beyond mere philosophical perspectives to contemporary socialization theory and various psychological processes to understand just how individuals internalize values (see Thomson, Adams, and Waldherr, report in preparation).

### 3.1.2 Learning from Experience and Mentorship

Experience and mentorship were cited as important mechanisms for training MEDM to CF members. SMEs agreed that MEDM training programs should be driven by CF members with operational experience and expertise. SMEs described a large gap between the senior officers and junior and non-commissioned officers in the 1990s. One reported that *"there were two militaries then"* because the senior officers at the time *"had never done anything"*, whereas *"the younger NCO, junior officers had been out on missions"* and, consequently, *"were very different from seniors"*. This gap, they suggested, was reflected in the creation of the Defence Ethics Program (DEP). Specifically, SMEs argued that due to the lack of senior operational experience at the time, civilian ethicists were hired to create the Defence Ethics Program for the CF. However, the influence of civilian ethicists resulted in a training program that largely focused on non-operational, clear-cut ethical problems (e.g. *"Do you embezzle?"*). This program failed to address the real ethical dilemmas that junior officers had faced in the field (e.g., *"shoot/don't shoot – life or death choices"*). SMEs felt that these *"lesser of two evils"* or *"between a rock and a hard place"* operational dilemmas were assumed to be unique and uncommon situations, when in the experience of these SMEs, these situations were far more common. Indeed, CF soldiers in operations were often confounded by situations in which no apparent correct choice existed (Thomson, Adams, & Sartori, 2006). In SMEs' view, to be maximally effective, CF MEDM training has to have an operational focus.

Another SME suggested that people tasked to help study and train phenomenon such as MEDM in a military context (e.g. civilian CF members, defence scientists, casualties support, and historians) need to be *"on the ground"* so that they can gain first-hand operational experience. As one SME stated, *"program planners need to walk a mile in soldier's shoes. That will make them a real expert."* Thus, while the SMEs acknowledge the necessity of highly educated civilian ethicists in an ethics training program, they strongly urged the inclusion of other CF members who have operational experience in such a program. This will provide non-combat CF members a better understanding of how their work can more effectively contribute to actual CF performance, and will provide program development efforts with the gravity of operational understanding.

Having CF members who have practical knowledge is consistent with what one SME described as a movement away from “*a hard assessment phase [in training] to a mentor phase*”. Experienced CF members can serve as mentors for students, for example, by debriefing students who have made ethical decisions. One SME strongly believed a mentor approach provides more opportunity for students to model moral behaviours and allows the dissemination of such behaviours throughout the organization.

Throughout the focus group, the issue of having practical operational knowledge in MEDM training remained a central issue for SMEs. Without proper guidance, junior CF members will have no choice but to develop their own interpretations of morality and ethical behaviour when they face difficult situations in the field.

### 3.1.3 Evaluation and Promotion Processes

One SME suggested that the CF can ensure an ethical climate and produce a “*moral compass*” by instituting better evaluation and promotion processes as they choose their leaders. He believed one way to do this would be to institute a 360° assessment for personal evaluations. As the name implies, this system involves obtaining assessments on a CF member’s performance from his or her superiors, peers, and subordinates. This provides a broader judgement of competencies and achievements. SMEs believed that this would result in the promotion of individuals on the basis of both strong performance as well as exemplary ethical conduct. He also criticised the current method of personnel promotion in which superiors selected members who resembled them. He argued that this process resulted in “*cronyism from top to bottom*”. In theory, a wider sample base for assessments would give an all-round evaluation of a member’s performance, thus preventing sycophantic individuals from receiving unfair promotions. Furthermore, SME’s also noted that for 360° assessments to aid in selecting CF members with high moral character for promotion, evaluation instruments and protocols must enable superiors, peers, and subordinates to robustly measure a candidate’s perceived moral and ethical conduct. Measures that evaluate only an individual’s operational performance will not necessarily be detailed enough to address ethical conduct.

Other SMEs noted that a critical aspect of ensuring continuous adherence to defined CF ethical values requires a strict approach to people who transgress CF values or have failed to represent the CF ethos. CF members who violate ethical conduct must face the appropriate punishments. One SME went so far as to suggest those who fail to comply with CF ethos “*must be expelled*”. However, participants were also quick to acknowledge care must be taken in handling the punishment. Higher command must mete out punishment because of problematic ethical conduct, not merely to create a scapegoat to ease political pressure. If political pressures govern how ethical breaches are treated, SMEs argued that CF members would only feel betrayed by higher command.

Finally, SMEs made the general suggestion that there needs to be more effective promotion of the moral and ethical instructors at military schools. Only the “*cream of the crop*” should be elevated to these important teaching and mentoring positions and not the “*bottom third*”. One SME suggested that it should be a “*plush post that people aspire to*” and only those who truly deserve it should be awarded it. Moreover, these postings cannot be for an indefinite time period as this would prevent instructors from gaining regular operational experience. One SME mentioned instructors need to deploy and then come back with operational experience that they can share with students.

All of the preceding initiatives for evaluation and promotion were viewed as indirect means of disseminating high moral and ethical conduct throughout the CF.

### 3.1.4 Systematizing MEDM Knowledge Transfer

Another indirect influence on MEDM in the CF is the transfer and dissemination of MEDM knowledge throughout the organization. SMEs noted that there is currently a failure to gather the knowledge gained by veterans from today's battlefield. They explained that the majority of knowledge transfer from experienced members to other CF members takes place informally by word-of-mouth (e.g., during a cigarette break). The lack of a formal structure for gathering and disseminating valuable field experience may lead to avoidable errors recurring. As one SME explained,

*"When I came back [from the tour]...no one asked me how did you...react to this and that. I was ripe for the picking. But you're not going to force yourself on people. We need to draw more experience from people."*

SMEs emphasized the importance for those CF members who are coming back from missions *"to sit down and talk"* about the moral and ethical decisions they made in operations for the benefit of those CF members who will be deploying. For example, those who are coming back from missions should spend a brief time in military schools, such as the Peace Support Training Centre (PSTC) in Kingston. SMEs see this as being relatively easy to implement: *"As soon as someone comes back from a mission, for six months, you belong to the PSTC."* Given the constantly changing nature of operations, SMEs suggested that soldiers should immediately be sent on a tour across Canada to speak of their experience, because *"what worked six months ago, may not work now"*. Having soldiers returning from duty speak about their experiences in MEDM would provide critical first-hand accounts to the rest of the CF. For example, soldiers returning from Afghanistan could recount their experiences and lessons learned in dealing with differing moral value systems from other cultures (including coalition member cultures), to help prepare the next CF rotation before they depart for Afghanistan. Moreover, recounting experiences and lessons learned could be incorporated into professional development programs and schools more systematically by way of key note speakers and documentation.

In addition to a lack of formal higher-level support to seek advice from soldiers returning from duty, SMEs also placed some of the responsibility for poor knowledge transfers on officers who had been unwilling (for whatever reason) to document their experiences. It was stated that about four hundred requests from the Canadian Forces Leadership Institute (CFLI) are made annually for CF personnel at all levels to share their mission experiences in essay format, and only about three percent oblige. Some SMEs believed it is an imperative for CF members at the command level to write about their unique experiences before they are permitted to go on leave because, *"in many cases, these guys are the only people with experience until the next poor bastard goes out with nothing to refer to"*. They believed that too much of the literature currently used in CF is based on US and British deployments in outdated conflicts, such as WWII and Korea.

Moreover, knowledge transfer should not be limited to the higher echelons of the forces. As SMEs noted, the moral and ethical experiences of personnel from Master Corporal to General need to be documented in whatever format. One SME acknowledged the challenge some CF members have in writing ability. However, he stated that one way around that is to send out interviewers to facilitate the knowledge transfer process, *"we just want the raw data; someone else can make it pretty"*. SMEs pointed out that the CFLI offers monetary and research support to help individuals document

their recent tour experiences. The support includes helping returning soldiers dictate their experiences and it provides editorial staff support. At the very least, *“talk into a tape, and we’ll turn that into an essay...we need to harass people”*.

Efforts to transfer knowledge, however, do exist. As one SME explained, for the first time, there is an individual from the Army’s Lessons Learned Centre deployed within Task Force Afghanistan (TFA) to help capture immediate institutional lessons. This suggests that similar efforts could be mounted in future operations to capture lessons learned in operational MEDM. However, according to one SME, whether or not these written accounts are integrated into the professional development system or the CF’s military schools is uncertain.

Therefore, a formal system of gathering and disseminating field experience is important to promote the MEDM of CF members. Because ethical dilemmas faced in an operational context are not the current focus of current CF ethics training programs, it is critical to provide more information and guidance to CF personnel about what they are likely to face in an operational context. Field experience can provide first-hand accounts of situations that previous personnel encountered, giving those individuals a heads up about the actual moral quandaries they may have to resolve once they are deployed. Having a formal system also ensures that only verifiable and factual knowledge is disseminated. A formal structure allows the inclusion of proper commentary and instruction to guide soldiers toward a more comprehensive understanding of the moral situations presented in field experience reports, and it enables CF command to link separate reports into a cohesive package that corresponds to the CF identity and ethos. On the other hand, soldiers who rely on an informal means of knowledge transfer may receive watered down or inaccurate word of mouth versions. At the very least, a completely informal, ad hoc system means that knowledge transfer of this nature occurs only on an ad hoc, non-systematic and possibly random fashion. Finally, systematized guidelines informing these moral and ethical reports would help soldiers interpret the decision making in a way that corresponds to the CF identity and ethos.

### 3.1.5 Post-MEDM Support Mechanisms

A final indirect training method of MEDM considered very important to SMEs is to reflect on the events that occurred and develop lessons learned in order to provide the necessary post-decision support processes for those CF personnel who have faced difficult moral dilemmas in operations. This was also highlighted in our previous interview study with senior officers who had faced these ‘lose–lose’ situations (Thomson et al., 2006). As one participant had explained,

*“Bad things are going to happen. And that really puts you in a dilemma, and builds up an incredible amount of stress both then and of course after the mission. There’s a delayed reaction...It exacts a horrendous toll on them psychologically at the time and later...”*

*“if a bad decision is made, you now have trouble dealing with the decision made, even though at the time it was the lesser of two evils...one thing we do badly is preparing people for ramifications of decisions”* (Thomson et al., 2006).

According to this participant, MEDM training must include promoting mechanisms that assist in coping with the outcome of the ethical decisions, especially in decisions where soldiers are forced to choose between the *“lesser of two evils”*, such as when a soldier has to choose between letting refugees perish from immediate violence or to escort them to a different location where they will face certain death from disease and starvation. Residual feelings of guilt and anguish often impact long after the fact.

During the focus group, SMEs discussed the importance of a system to help CF members deal with the potential ramification of their moral and ethical decisions after the fact. As one said, “*We have to accept that there will be guys coming back who lost their minds.*” SMEs urged for continuous support following a soldier’s return from tour, and were critical of the stigmatization of PTSD. Soldiers need to be assured by senior staff and experienced peers that they had made the best choice given the situation and to be told not to second guess themselves. Therefore, part of training and educating soldiers in MEDM requires that soldiers revisit and discuss the decisions they made during operations.

According to Kirkland, Halverson, and Bliese (1996), soldiers should go through a “validation” process for stress experienced on the field, which ultimately reassures them that their actions and feelings in the performance of duties were acceptable. They hold that validation comes from support by comrades and immediate leaders in the operation, approval from high levels in the military, government, and the public, and from commemoration to fallen soldiers. It requires honesty from the top down, the empowerment of subordinate leaders with the freedom to decide on welfare of troops, and a command climate of respect. In this way, CF personnel can receive validation for the difficult moral and ethical decisions they made in operations.

#### *After Action Review*

One method for CF members to deal with the aftermath of their MEDM comes in the After Action Review (AAR), where soldiers can sit down with their superior to discuss and thereby validate their experiences, and identify problematic choices and offer solutions to these in case they arise again in the future. An important aspect of the AAR is that it demonstrates support from the chain of command. Soldiers must not feel that they have been used as a scapegoat by higher command, as it has the effect of eroding trust and faith in the CF ethos.

#### *Stress debriefing*

Another mechanism for post-MEDM support is the stress debriefing where peers form an informal group talk and listen to each other. It was clear from SMEs comments that, in general, support and affirmation from superiors is a necessary part in a moral and ethical training program. SMEs emphasized CF members must not be allowed to develop the idea that they are on their own when facing the consequences of their moral and ethical decisions, something felt during the operations in the 1990s (Thomson et al., 2006). SMEs saw this change occurring today. For example, SMEs praised CF higher command’s vindication of navy personnels’ responsibility in the Chicoutimi submarine fire as a recent demonstration of support from the chain of command.

#### *Decompression periods*

SMEs also discussed decompression periods for returning soldiers as a mechanism to deal with moral and ethical challenges faced during operations. SMEs explained that an immediate return to normal activities and routines can be a big culture shock. During the decompression period, soldiers return to a camp and participate in structured activities for a short period, which will give them a chance to unwind and reintegrate into a controlled atmosphere. Being in the company of other soldiers who share the CF identity also contributes to the re-adjustment process. In addition, family reintegration can be supported by providing a soldier with uninterrupted time with the family, predictable duty schedules, and family help support (Kirkland et al., 1996).

These mechanisms should compliment the early pre-deployment training for MEDM in an operational context. As such, they will not be used as crisis management instruments, but rather a

way of providing a comprehensive training package for CF personnel who will undoubtedly face critical moral dilemmas in the field and live with the consequences of their decisions.

## 3.2 Training MEDM in Operational Contexts

SMEs also discussed direct mechanisms for training MEDM in an operational context. The focus group discussed the general requirements for training as well as identifying several different methods by which MEDM should be trained, which include case study training in a classroom setting, live scenario-based training, and computer simulations.

### 3.2.1 Specific Training Requirements

The following section highlights specific training requirements arising from focus group discussions.

#### *Implementation at all Levels*

SMEs argued that one requirement for CF MEDM training mechanisms is they must be implemented and understood at all levels of the CF. For example, one SME believed that “*everyone has to see*” the case studies of ethical dilemmas in the operational environment. Another provided an example of the potentially critical ramifications of MEDM in both current and future operational contexts. He explained,

*“A strategic corporal can make a split second decision in Kandahar and the Prime Minister may have to answer for this decision the next day. Everyone’s decision can affect the nation tomorrow. The world and Canada judges CF’s decisions... every decision impacts operational effectiveness.”*

Any member of the CF may need to make a moral decision in operations that goes beyond typical mission objectives. And as such, it is incumbent on any CF training program to acknowledge this and provide adequate MEDM training to all its members.

#### *Regular Training*

According to SMEs, training for MEDM that may occur in an operational context must occur more frequently than is typically the case for the majority of CF members. SMEs believed, that although it is important to train MEDM prior to deployment as a refresher course, moral decision making does not emerge “*in a two – three day course*” and argued that the current system of training is not maximally helpful. One explained, “*Right now, we have [moral and ethics] training every one or two years. Training needs to be repeated, to be regularly experienced.*” This opinion was also expressed in previous interviews with senior officers. As one participant stated,

*“You don’t embed ethics into a person by a two-day session...I don’t say there is anything wrong with it. You need to have your ethical values spelled out somewhere...I think the ethics program of the CF does that...But it would be dreaming to think giving two-day sessions here and there would do the trick...”* (Thomson et al., 2006)

Ultimately, they argued, ethics is experiential in nature.

SMEs also noted that training should be both regular and intensive. As one noted, “*Training needs to be repeated...until it is instinctive.*” The SMEs believed that drills have to be embedded into CF MEDM training. This would help CF members make good moral and ethical decisions reflexively to prevent fatal moments of hesitation. “*If you never face the situation, you won’t know how to*

*react. Drills gives [sic] a start at least....*” As with other forms of military training, repetitive practice allows for faster reactions and better responses.

### ***Attention to Cultural Awareness***

Given that many of the CF’s current deployments involve CF members serving as UN peacekeepers in cooperation with multinational teams, it is vital that CF members have a good understanding of different perspectives to the diverse MEDM across different cultures. Despite strong efforts within the current CF training mechanisms to provide relevant cultural awareness through discussion and role play exercises, SMEs argued that there is still a “*deficiency*” in training in general and in relation to MEDM.

*“Things like religion – Christian, Muslim – change your approach...I won’t be afraid to search a North American woman, but not in Afghanistan ...”*

One example of difficulties in dealing with foreign cultural values is the custom for CF members in Afghanistan to remove their armour while meeting with village elders, “*because it’s unacceptable in their [Afghani] culture to hurt a guest.*” Unfortunately, CF Lt. Trevor Green was attacked and wounded during such a meeting. One SME warned that this event creates dangerous potential for CF members to make knee-jerk judgments about the moral and ethical values of foreign cultures, “*you gotta be careful about knee jerking – ‘[that] everyone is psycho, crazy, mass murderer’ – that’s not true in any culture.*”

Currently, CF cultural training teaches students the normal customs, values and traditions of a culture. However, the chaos of war has the potential to subvert the mores of a culture to some extent. Cultural awareness training needs to help CF members understand a culture’s traditional values within the context of the current conflict, not just what the culture looks like in less chaotic times. SMEs noted that knowing what a culture is supposed to look like in normal times will help soldiers identify what is missing so that they can normalize the environment. As one SME stated, “*knowing what is supposed to be, helps you know if something is missing, and you can help direct the area back to what is normal*”. Again, this helps CF personnel understand the underlying values of a war torn society and helps them reconcile their MEDM with these standards to the extent possible.

One SME also mentioned that CF soldiers are not well-prepared for the foreigner’s reactions to their moral decisions. He provided a personal anecdote,

*“In Bosnia, people get quizzical looks at me after I make decisions, or something I tell them to do, or something I am planning to do. They look at me, ‘Are you stupid?’ People don’t understand why we do what we think is the right thing to do.”*

CF members and local populations may come to different conclusions about the proper moral and ethical choice in a given situation. For example, deployed CF members would doubtlessly intervene in a public stoning, despite the fact that such a punishment may be legally and fairly ordered by the local court. In such situations, the correct course of action for a CF member is highly ambiguous. CF members who attempt to intervene may be seen by the local population as foreign belligerents imposing themselves on their judicial system, especially if intervention lies outside the mission mandate. Good cultural awareness training mechanisms might help CF members understand more fully the ethical positions of other cultures, which in turn might help them approach or defuse these culturally-based ethical dilemmas more effectively. It may be that this wider cultural understanding would enable, CF members to better reconcile their moral and

ethical standards with foreign standards. However, at this point this last notion is still speculative and requires empirical validation.

SMEs also mentioned the importance of recognizing cultural diversity within the CF itself. With increasing ethnic diversity in Canada, the CF member base is becoming increasingly heterogeneous. Not all CF members share the same traditional underlying beliefs with each other. This was viewed by the focus group participants as an advantage rather than an obstacle. As one SME explained, *“I think we need more – even over-representation of ethnic minorities. If we recruit different ethnicities, we can learn from the inside...”* As UN multinational peacekeepers, CF members often travel to remote locations. In such operations, CF members will find themselves working alongside colleagues and against antagonists and belligerents who have vastly different moral and ethical belief systems. By having a large representation of different cultural values within the CF and embracing these as legitimate positions, the CF may be better prepared to confront and adapt to various moral and ethical systems in operations.

### ***Realistic Training Approaches to MEDM***

SMEs argued that traditional academic MEDM models are problematic because they may not be fully applicable to MEDM in chaotic operational contexts. Some of these models, for example, suggest that optimal decisions are made by analysing all the data and possible outcomes. This is unrealistic in the CF operational context, where MEDM occurs in highly constrained and chaotic situations. SMEs argued that CF training mechanisms should be based on more naturalistic decision making models. Such models emphasize performing non-exhaustive searches for information that do not exceed personal capacities and remain within real-world limits.

SMEs also argued that traditional models of decision making fail to address the importance of the collaborative process. As one SME explained,

*“I think the military – despite the stereotype – good officers have always asked for and offered advice. The ones that weren’t so good [at it] didn’t live very long.”*

In addition to consulting with fellow CF members, other non-conventional external agents, such as non-governmental organizations and diplomats, may impact CF members in MEDM.

Moral and ethical training can facilitate this external consultation by equipping CF members with the skills to communicate with and the skill to seek counsel from external agents in times that require it. *“Sometimes it’s just listening, you just need 3 seconds to hear an alternative, but it’s creating a mini culture of open exchange.”* This culture will be contingent on a strong CF ethos that encourages open exchange of a variety of positions. Training that facilitates good open communication among all participants is likely to be very helpful in fostering norms around collaborative MEDM.

### **3.2.2 Case Study Training**

SMEs were very supportive of a scenario-based case study approach to training MEDM in a classroom setting to compliment a traditional formal lecture style of ethics. In such an approach, trainees would enact the moral decision making process through discussions of unique, real-life examples with other classmates. SMEs argued that it would be helpful to have a workbook containing a number of first hand accounts that would allow trainees to ask difficult questions like *“Why is it that when you face right and wrong, you still [have to] choose wrong?”* These situations not only expose students to a realistic moral dilemma in operations, but also encourage them to work through the pros and cons of each position. These case studies would be used at both the



individual and team level, and students would be challenged to discuss the dilemma and to justify their decision making in a team format (e.g., perhaps with one half of the students could argue for one position, while the other half would argue for a different choice). This process would promote more understanding of the complex process of MEDM as well as foster the collaborative decision making process.

Well-developed scenario-based training would allow CF members to identify the features of an ethical dilemma, to consider the pros and cons of various courses of action and to plot out potential ways to resolve the problem. Such a classroom approach would also allow the mentor or trainer to manipulate various aspects of the situation (time constraints or type of mission) in order to determine whether there are different moral responses to the same dilemma situations. For example, one SME explained, *“we would present a scenario, then add things like ‘If there was a camera crew there, would you change your action?’”* In this case, adding the extra dimension of media scrutiny could potentially have a serious impact on MEDM processes as well as the decision outcome. Most importantly, students would have the opportunity to explore their own responses in varying moral situations within a safe environment.

Of course, the use of scenario-based case studies is predicated on the ability of the CF to obtain first hand accounts of moral and ethical dilemmas in current operations. A successful scenario-based training program such as this will therefore require a robust knowledge transfer system. As noted earlier, many scenarios currently available are from *“British and American sources”* and outdated conflicts.

### 3.2.3 Live Scenario-Based Training

One SME suggested that *“it’s not enough to make a book, a video about ethics. You need to live it.”* Live scenario-based training exercises are crucial to an effective MEDM training program. They are a means of preparing CF personnel for what they might face before deploying to the mission area. As one SME mentioned,

*“Training should be scenario based. It should put people in situations that they will face. Training has to be realistic. It needs to be tied to the environment. Can you create these situations? Yes. You need to put every soldier in those situations.”*

One SME provided an example of a live training exercise he had seen that involved a time-constrained moral decision. He explained a training team was about to attack a position when they realized that there was a village between themselves and their target. While the team considered what to do, balancing mission success, force protection and the safety of civilians in the village, they came under bombardment from the enemy, who were hiding in the mountains near the village. In this case, as a result of the time taken to deliberate their ethical decision, the training team was terminated. Because operational ethical decisions occur under extremely trying situations and soldiers simultaneously confront competing obligations, moments of hesitation can be fatal to a number of parties.

An excellent example of a live scenario-based training exercise that demands MEDM occurs at the Peace Support Training Centre. As part of their training in the Peace Support Operations Military Observer (PSO Mil Obs) course, soldiers in teams of two or three members complete a half-day dismounted field exercise where they must apply classroom instruction to realistic simulations. For example, soldiers in one particular stand encounter a human rights violation and must negotiate with the alleged perpetrators for the release of the victims. This exercise exposes students to live situations that are highly characteristic of their upcoming military observer missions. SMEs agreed

that this is a good live scenario-based training exercise for MEDM because often soldiers have to “do what is most right”. One SME suggested that, in this particular scenario, there are really “no wrong answers”. Properly responding to these challenging live situations requires self-control, discipline, and mental fortitude, characteristics that might be difficult to develop in the classroom or with textbook-based instruction alone.

Both the classroom and live scenario-based exercises encourage CF members to discuss ethical issues and to learn from each other. It is especially effective when student teams come from different mission areas or have different levels of experience. In this way, students can share and build on each other’s approaches to difficult moral and ethical situations. This group approach also encourages students to get in the habit of asking others for their perspective in such situations. One function of live scenario-based training exercises is to help CF members recognize the operational constraints and demands they may confront on the battlefield. This allows CF members to reflect on what they did and why, how they felt during and after the exercise, and to discuss their decision making experience with peers and superiors. Ultimately, live scenario-based training has the potential to provide members with MEDM knowledge and heuristics for use in actual operations.

#### **3.2.4 Computer Simulations**

As technology improves at a rapid pace, realistic computer gaming simulations are increasingly being used for military training (e.g. Institute for Creative Technologies, n.d.). Although moral and ethical issues are not usually the focus of computer simulations, SMEs agreed that they have the potential to be an important vehicle for training MEDM. For example, one way to incorporate morality into computer simulations is to investigate immoral actions within the game world itself. One SME provided an anecdote where troops playing a first-person shooting simulation killed the civilian avatars for fun. Their behaviour immediately triggered the appropriate punishments, and the team leader was asked to explain why his subordinates were permitted to act in this way.

Computer training, however, should only compliment other forms of face-to-face training because, as SMEs mentioned, discussion is a major and critical component of the other training methods. Thus, although computer simulations can mimic the consequences of MEDM, they should also include an AAR.

## 4. Summary of Findings

This report consisted of two parts. The first outlined five indirect influences on a training program in MEDM. First, focus group SMEs highlighted the importance of instilling the unique Canadian military ethos into CF members. They believed internalization of the CF ethos will ensure moral and ethical conduct in its members because any action to the contrary will be ultimate self-destruction. Though the CF has clearly delineated the CF ethos, it needs to consider the socialization and psychological processes that help instil these into its members.

Second, SMEs favoured a MEDM training program driven by CF members with operational experience, instead of relying on civilian ethicists or CF members who have not had recent operational experience. According to SMEs, those with operational experience are better equipped to educate and mentor CF members about actual battlefield moral and ethical decisions for which there may be no one best or correct solution. When civilian ethicists and DND members with little operational experience are involved, SMEs suggested they should get operational experience.

Third, SMEs believed moral and ethical criteria must be incorporated into the CF personnel evaluation and promotion process to avoid choosing those individuals who have engaged in unethical behaviour. They explained that those who demonstrate the CF ethos should be rewarded, while violators must be punished sternly. A 360° evaluation (where CF members are assessed by superiors, peers, and subordinates) was suggested as a means to achieve this and prevent “*cronyism*”. SMEs also said that those who hold postings in CF instructional and training institutes must be the “*cream of the crop*”. Experience and mentors with integrity were argued to be the best trainers of MEDM.

Fourth, SMEs argued that soldiers returning from duty have an obligation to transfer their field MEDM experiences back to the CF, such that these valuable experiences can be used to educate other CF members. Currently, this only occurs through informal discussions. Instead, SMEs insisted this process needs to be formal and systematic to ensure current moral and ethical challenges faced in operations are recorded and shared across the forces. SMEs explained that the resources for documenting operational experiences are available to all soldiers, but the formal process needs to be instituted.

The final indirect mechanism comes in the form of post-MEDM support. For those CF members returning from missions in the 1990s, some felt that they did not get the support from higher chains of command following the tough moral and ethical decisions they made on the ground (Thomson et al., 2006). SMEs therefore urged post-MEDM support mechanisms, such as AARs, a validation process, stress debriefings, and decompression after missions. These activities should compliment the early pre-deployment training for MEDM in an operational context, and will help soldiers cope with the tough moral and ethical decisions they made in operations.

The second part of this report focused on the direct training mechanisms for MEDM in an operational context. SMEs provided a number of requirements for a future MEDM training program. They said that training MEDM needs to occur at all levels of the CF. SMEs mentioned a master corporal can make a moral decision that impacts operational effectiveness all the way up the ranks. Moreover, MEDM must be trained regularly. SMEs believed that a two day course was inadequate for this kind of training. It needs to be repeated so that it is “*instinctive*”. As well, cultural awareness training helps to reveal underlying value systems and norms of mission areas and mission participants. But SMEs mentioned that cultural awareness also needs to at least

acknowledge the current conditions in the host country, i.e., values and norms during war time, which might be very different compared to times of peace.

SMEs favoured case study training in a classroom setting over merely formal instruction on moral theory. However, case studies need to be developed from the experiences of CF members and must include current CF operations. At present, many of the case studies reflect past conflicts (e.g., The Korean War) from other countries' militaries (e.g., United States). SMEs said instructors can use these new and current cases to discuss with CF members about the MEDM process. Another direct training mechanism identified by CF personnel is live scenario-based training exercises, such as the Human Rights Violation Stand at the PSTC in Kingston, ON. These allow CF members to develop self-control and discipline while undergoing a live training experience. SMEs also thought that computer simulated training with a focus on MEDM would enhance the current CF training for MEDM in an operational context, but required an AAR to ensure face-to-face instruction.

As a whole, then, this focus group provided extremely valuable and critical guidance for the CF in terms of promoting the best environment for optimal MEDM and specific ideas about how training programs can be designed to build on the progress that the CF has already made. Hopefully, these suggestions will be adopted in order to address the moral and ethical challenges that arise in current CF operations and to improve MEDM training by focusing in operational contexts to promote operational effectiveness within CF operations.

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(U) A half-day focus group discussion exploring current Canadian Forces (CF) training for moral and ethical decision making (MEDM) in an operational context was convened at CFB Kingston, Kingston, ON with six active Commissioned and Non-Commissioned Canadian Forces Officers who each had operational experiences involving moral and ethical challenges. Participants emphasized the importance of robust MEDM training for CF operational effectiveness. They identified five indirect means of training MEDM, which include promoting and instilling CF ethos and identity; learning from CF members' operational experience and providing strong mentorship; evaluating and promoting individuals who consistently demonstrate high ethical conduct; systematizing MEDM knowledge transfer, and providing good post-MEDM support, including after action reviews, stress debriefings, and post-mission decompression opportunities. Participants also discussed specific requirements for training MEDM. For example, participants emphasized training MEDM is required at all rank levels and that it needs to occur regularly, as optimal MEDM cannot be promoted in a "two-day" course once every year. Lastly, participants also endorsed several direct means of training MEDM in an operational context. These included classroom case study training; live scenario-based training; and computer simulations.

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